

SiteManager **Training Manual**



Module A
Chapter 2

Contract Administration
Contract Records
Contract Authority

Section A-1-2-7-1

Assigning Contract Authority to a User

Student's Version

Indiana Department of Transportation
March 2009, Version 3.9a

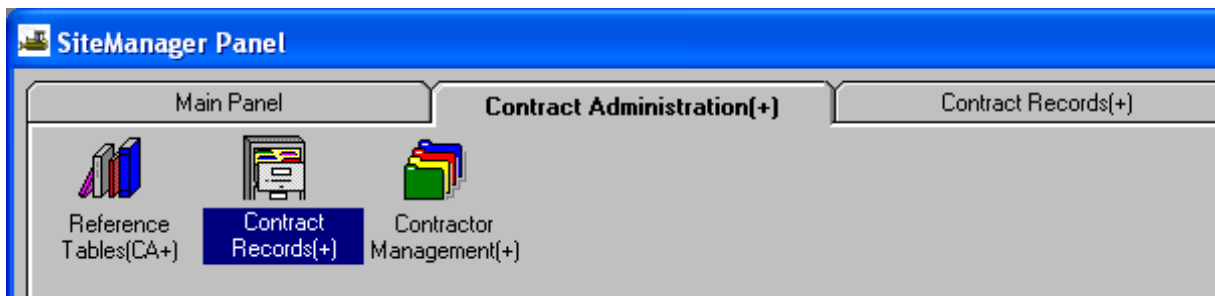
This page intentionally left blank

Assigning Contract Authority to a User

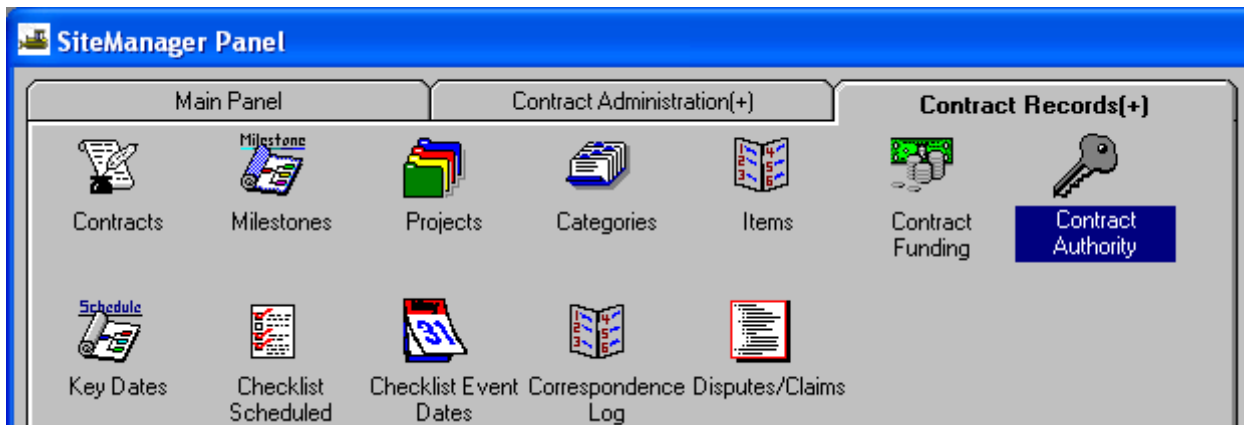
This document will explain how to add, and view, a user's Authority to a specific contract. The Contract Authority panel displays the users, office levels, office-wide access indicator, and user group assignments.



“Double-click” on the **Contract Administration (+)** icon located on the Main Panel.



“Double-click” on **Contract Records (+)**.



“Double-click” on **Contract Authority**.

Adding contract authority to a User

User ID	User Name	CO	DO	AE	Active
d90hfly	Fly, Hyrum D.	No	660		<input checked="" type="checkbox"/>
d90hston	Stone, Hurley	No	660		<input checked="" type="checkbox"/>
d90lgree	Greene, Jade	No	660		<input checked="" type="checkbox"/>
d90lques	Quest, John	No	630		<input checked="" type="checkbox"/>
d90lexce	Excel, Lynn	No	610		<input checked="" type="checkbox"/>
d90mfund	Funds, Mona	No	610		<input checked="" type="checkbox"/>
d90mgrea	Great, Magnus D.	No	650		<input checked="" type="checkbox"/>
d90mscen	Scense, Mac	No	620		<input checked="" type="checkbox"/>
d90pes	Project Engineer/Supervisor	Yes			<input checked="" type="checkbox"/>

Group Description	Office-wide Access	Contract Id	Contract Description	Authority Start Date	Authority End Dt
SiteManager Inquiry Group	<input type="checkbox"/>	R -90011	INTERSECTION IMPROVEMENT AND TRAFFIC	5/19/2007 11:45:	
Certified Testing Tech, Server	<input checked="" type="checkbox"/>	R -90011	INTERSECTION IMPROVEMENT AND TRAFFIC	5/19/2007 11:45:	

The **Contract Authority** window appears. Use the Find, Filter or Sort functions to locate the appropriate User ID or User Name.

“Click” on the appropriate **User ID** or **User Name** of the person that is to be added to a contract.

The contract and user group assigned to the person selected appears in the bottom panel.

Group Description: The **Group Description** contains all the current user's active group assignments.

Office-wide Access: The **Office-wide Access** checkbox indicates whether the user has access to all of the Contracts within a set area.

Contract ID: The **Contract ID** indicates the particular contract the user has access to.

Contract Description: **Contract Description** is the description of the contract, when a user is assigned rights. It is automatically populated.

Authority Start Date: The **Authority Start Date** is the date when a user is assigned rights. It is automatically populated.

Authority End Date: The **Authority End Date** is the date when a user is removed from a contract it is automatically populated.

User ID	User Name	CO	DO	AE	Active
d90hfly	Fly, Hyrum D.	No	660		✓
d90hston	Stone, Hurley	No	660		✓
d90lgree	Greene, Jade	No	660		✓
d90lques	Quest, John	No	630		✓
d90lexce	Excel, Lynn	No	610		✓
d90mfund	Funds, Mona	No	610		✓
d90mgrea	Great, Magnus D.	No	650		✓
d90mscen	Scense, Mac	No	620		✓
d90pes	Project Engineer/Supervisor	Yes			✓

Group Description	Office-wide Access	Contract Id	Contract Description	Authority Start Date	Authority End Dt
SiteManager Inquiry Group	<input type="checkbox"/>	R -90011	INTERSECTION IMPROVEMENT AND TRAFFIC	5/19/2007 11:45:	
Certified Testing Tech, Server	<input type="checkbox"/>	R -90011	INTERSECTION IMPROVEMENT AND TRAFFIC	5/19/2007 11:45:	

“Click” on the **New**  button located on the toolbar.

Group Description	Contract Id	Contract Description	Authority Start Date
Certified Testing Tech, Server			

The **New Contract Group Authority** window appears.

“Click” on the appropriate **Group Description** for the user from the drop-down list.

NOTE: that only the Groups that have user rights will appear.

Group Description	Contract Id	Contract Description	Authority Start Date
Certified Testing Tech, Server			

The **Contract ID** can be searched by “right-clicking” in the **Contract ID** field.
“Click” on **Search**.

Search Window

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2
dea29453	99-9999966	0501242	ACTV	C006	610
dea90004	99-9999966	STP 3387005	ACTV	C087	660
MT-DOCS	00-0000000	MT_DOCS	ACTV	C094	900
R -90001	99-9999999	STP 3387005	ACTV	C087	660
R -90002	99-9999988	STP 3387005	ACTV	C087	660
R -90003	99-9999977	STP 3387005	ACTV	C087	660
R -90004	99-9999966	STP 3387005	ACTV	C087	660
R -90005	99-9999955	STP 3387005	PEND	C087	660

OK Cancel

Use the Find, Filter or Sort functions to locate the appropriate contract.
 “Double-click” on the appropriate **Contract ID**.

New Contract Group Authority

Group Description	Contract Id	Contract Description	Authority Start Date
Certified Testing Tech, Server	R -90001	ON SR 261 AT OAK GROVE/CASEY/FUGUAY RD	

Save Cancel

“Click” the **Save**  button located on the bottom toolbar.

AASHTO SiteManager

File Services Window Help

Contract Authority


User Identification

User ID	User Name	CO	DO	AE	Active
d90hfly	Fly, Hyrum D.	No	660		<input checked="" type="checkbox"/>
d90hston	Stone, Hurley	No	660		<input checked="" type="checkbox"/>
d90igree	Greene, Jade	No	660		<input checked="" type="checkbox"/>
d90iques	Quest, John	No	630		<input checked="" type="checkbox"/>
d90lexce	Excel, Lynn	No	610		<input checked="" type="checkbox"/>
d90mfund	Funds, Mona	No	610		<input checked="" type="checkbox"/>
d90mgrea	Great, Magnus D.	No	650		<input checked="" type="checkbox"/>
d90mscen	Scense, Mac	No	620		<input checked="" type="checkbox"/>
d90pes	Project Engineer/Supervisor	Yes			<input checked="" type="checkbox"/>

Contract Authority Assignment

Group Description	Office-wide Access	Contract Id	Contract Description	Authority Start Date	Authority End Dt
SiteManager Inquiry Group	<input type="checkbox"/>	R -90011	INTERSECTION IMPROVEMENT AND TRAFFIC	5/19/2007 11:45:	
Certified Testing Tech, Server	<input type="checkbox"/>	R -90001	INTERSECTION IMPROVEMENT AND TRAFFIC	12/17/2007 08:22	
Certified Testing Tech, Server	<input type="checkbox"/>	R -90011	INTERSECTION IMPROVEMENT AND TRAFFIC	5/19/2007 11:45:	

The new user group assignment appears in the **Contract Authority** Assignment panel with the current date and time automatically filled out in the **Authority State Date** field.

“Click the **Close**  button located on the toolbar to exit the window.

Removing Contract Authority from a User

It may be appropriate to assign a Contract End Date in the future for personnel that may be leaving a contract on a particular date in the future.

The screenshot shows the AASHTO SiteManager application window. The 'Services' menu is open, and 'End Contract Authority' (Ctrl+Shift+E) is selected. Below the menu, there are two main sections:

User Identification

User ID	User Name	CO	DO	AE	Active
d90htly	Fly, Hyrum D.	No	660		<input checked="" type="checkbox"/>
d90hston	Stone, Hurley	No	660		<input checked="" type="checkbox"/>
d90jgree	Greene, Jade	No	660		<input checked="" type="checkbox"/>
d90iques	Quest, John	No	630		<input checked="" type="checkbox"/>
d90lexce	Excel, Lynn	No	610		<input checked="" type="checkbox"/>
d90mfund	Funds, Mona	No	610		<input checked="" type="checkbox"/>
d90mgrea	Great, Magnus D.	No	650		<input checked="" type="checkbox"/>
d90mscen	Scense, Mac	No	620		<input checked="" type="checkbox"/>
d90pes	Project Engineer/Supervisor	Yes			<input checked="" type="checkbox"/>

Contract Authority Assignment

Group Description	Office-wide Access	Contract Id	Contract Description	Authority Start Date	Authority End Dt
SiteManager Inquiry Group	<input type="checkbox"/>	R -90011	INTERSECTION IMPROVEMENT AND TRAFFIC	5/19/2007 11:45:	
Certified Testing Tech, Server	<input type="checkbox"/>	R -90001	INTERSECTION IMPROVEMENT AND TRAFFIC	12/17/2007 08:22	
Certified Testing Tech, Server	<input type="checkbox"/>	R -90011	INTERSECTION IMPROVEMENT AND TRAFFIC	5/19/2007 11:45:	

Use the Find, Filter or Sort functions to locate the appropriate **User ID** or **User Name**.

“Click” on the appropriate **User ID**.

“Click” in the bottom panel.

“Click” on the appropriate **Group Description** associated to the appropriate **Contract ID** whose authority will be ended.

“Click” on **Services** button located on the menu bar.

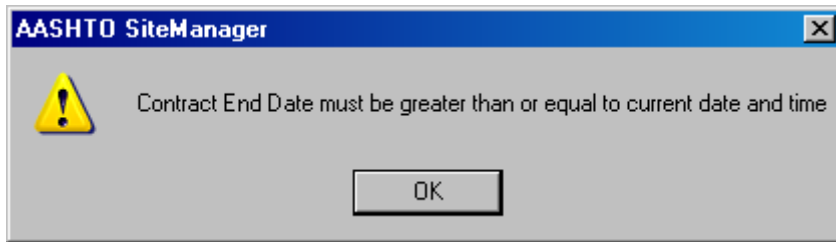
“Click” on **End Contract Authority**.



The **Contract Authority End Date** window opens with the current date and time in the **Contract End Date** field.



If the current date and time are not appropriate “double-click” on the time/date field and “enter” the appropriate date/time. Note: The user has authority until the following day.



The **Current End Date** must be the current date/time or a future date/time.


User Identification

User ID	User Name	CO	DO	AE	Active
PE/S	Project Engineer/Staff	No	610		<input checked="" type="checkbox"/>
d90pes	Project Engineer/Supervisor	Yes			<input checked="" type="checkbox"/>
d90ques	Quest, John	No	630		<input checked="" type="checkbox"/>
txsrck	Rack, Rick	Yes			<input type="checkbox"/>
mrrand	Randolph, Randolph	Yes			<input type="checkbox"/>
txsrred	Red, Reid	Yes			<input type="checkbox"/>
txxsredd	Redd, Scarlet	Yes			<input type="checkbox"/>
txsbres	Results, Bess T.	Yes			<input type="checkbox"/>
txccroa	Roaste, Chuck	Yes			<input type="checkbox"/>

Contract Authority Assignment

Group Description	Office-wide Access	Contract Id	Contract Description	Authority Start Date	Authority End Dt
Certified Testing Tech, Server	<input type="checkbox"/>	R -90011	INTERSECTION IMPROVEMENT AND TRAFFIC	5/19/2007 11:45:	
SiteManager Inquiry Group	<input type="checkbox"/>	R -90011	INTERSECTION IMPROVEMENT AND TRAFFIC	5/19/2007 11:45:	
Certified Testing Tech, Server	<input type="checkbox"/>	R -90001	INTERSECTION IMPROVEMENT AND TRAFFIC	3/6/2009 11:19:4	3/15/2009 00:00:0

The end date will appear in the **Authority End Dt** field in the **Contract Authority Assignment** panel.

“Click” the **Close**  button located on the toolbar to exit this window.

To view contract Authority

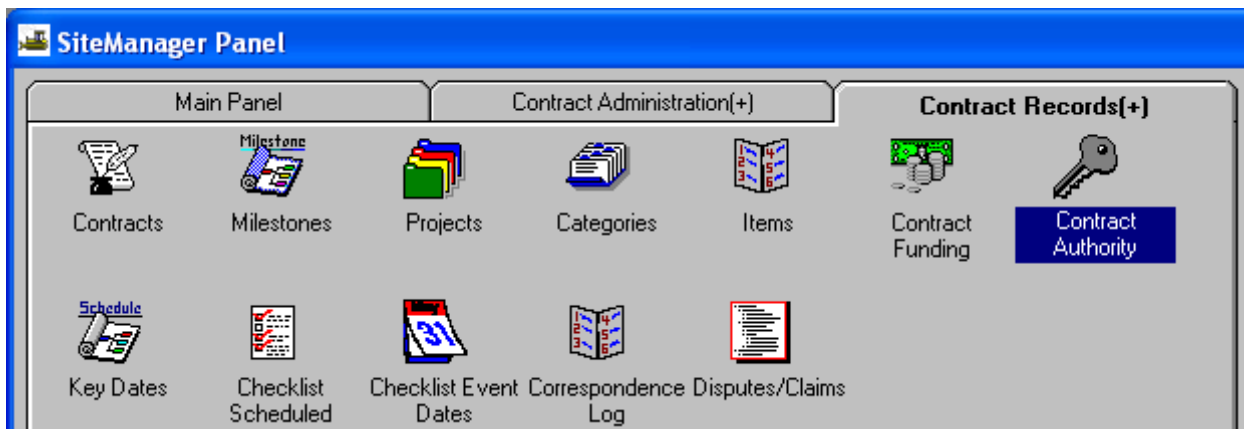
The Contract Authority panel displays the users, office levels, and user group assignments.



“Double-click” on the **Contract Administration** icon located on the Main Panel.



“Double-click” on **Contract Records (+)**.



“Double-click” on **Contract Authority**.

User ID	User Name	CO	DO	AE	Active
d90hfly	Fly, Hyrum D.	No	660		<input checked="" type="checkbox"/>
d90hstn	Stone, Huiley	No	660		<input checked="" type="checkbox"/>
d90jgree	Greene, Jade	No	660		<input checked="" type="checkbox"/>
d90jqques	Quest, John	No	630		<input checked="" type="checkbox"/>
d90lexce	Excel, Lynn	No	610		<input checked="" type="checkbox"/>
d90mfund	Funds, Mona	No	610		<input checked="" type="checkbox"/>
d90mgrea	Great, Magnus D.	No	650		<input checked="" type="checkbox"/>
d90mscen	Scense, Mac	No	620		<input checked="" type="checkbox"/>
d90pes	Project Engineer/Supervisor	Yes			<input checked="" type="checkbox"/>

Group Description	Office-wide Access	Contract Id	Contract Description	Authority Start Date	Authority End Dt
District Construction Technician	<input type="checkbox"/>	R -90001	INTERSECTION IMPROVEMENT AND TRAFFIC	10/12/2006 14:24	
District Construction Technician	<input type="checkbox"/>	R -90006	INTERSECTION IMPROVEMENT AND TRAFFIC	10/16/2006 07:53	
District Construction Technician	<input type="checkbox"/>	R -90007	INTERSECTION IMPROVEMENT AND TRAFFIC	10/16/2006 07:53	

The **Contract Authority** window appears. “Click” on the appropriate **User ID** or **User Name** of the person.

The contract and user group assigned to the person selected appears in the bottom panel.

Group Description: The **Group Description** contains all the current user's active group assignments.

Office-wide Access: The **Office-wide Access** checkbox indicates whether the user has access to all of the Contracts within a set area.

Contract ID: The **Contract ID** indicates the particular contract the user has access to.

Contract Description: **Contract Description** is the description of the contract, when a user is assigned rights. It is automatically populated.

Contract Description: **Contract Description** is the description of the contract, when a user is assigned rights. It is automatically populated.

Authority Start Date: The **Authority Start Date** is the date when a user is assigned rights. It is automatically populated.

Authority End Date: The **Authority End Date** is the date when a user is removed from a contract it is automatically populated.

AASHTO SiteManager

File Services Window Help


Contract Authority Close

User Identification

User ID	User Name	CO	DO	AE	Active
lxscsout	Souther, Chuckie	Yes			<input type="checkbox"/>
ss	Special Sampler, Server	Yes			<input checked="" type="checkbox"/>
sss	Special Sampler, Standalone	Yes			<input checked="" type="checkbox"/>
mrhspra	Spray, Harold	Yes			<input type="checkbox"/>
d90hston	Stone, Hurley	No	660		<input checked="" type="checkbox"/>
sysadmin	Sys Admin Backup	Yes			<input checked="" type="checkbox"/>
mrtyayl	Taylor, Tiffany	Yes			<input type="checkbox"/>
test4dea	test4dea	Yes			<input checked="" type="checkbox"/>
d90test	Tester, Testy	No	620		<input checked="" type="checkbox"/>

Contract Authority Assignment

Group Description	Office-wide Access	Contract Id	Contract Description	Authority Start Date	Authority End Dt
District Construction Technician	<input type="checkbox"/>	R -90001	INTERSECTION IMPROVEMENT AND TRAFFIC	10/12/2006 14:24	
District Construction Technician	<input type="checkbox"/>	R -90006	INTERSECTION IMPROVEMENT AND TRAFFIC	10/16/2006 07:53	
District Construction Technician	<input type="checkbox"/>	R -90007	INTERSECTION IMPROVEMENT AND TRAFFIC	10/16/2006 07:53	
District Construction Technician	<input type="checkbox"/>	R -90004	INTERSECTION IMPROVEMENT AND TRAFFIC	8/22/2006 07:34	
District Construction Technician	<input type="checkbox"/>	R -90003	INTERSECTION IMPROVEMENT AND TRAFFIC	10/12/2006 14:27	10/12/2006 14:28

“Click the **Close**  button located on the toolbar to exit the window.

Assigning Contract Authority to a User

Exercise A-7-1-T

Group Exercise

View and assign Contract Authority to User

Log into SiteManager as update
Password pass

Navigate from the **Main Panel**:

“Double-click” on **Contract Administration**

“Double-click” on **Contract Records (+)**.

“Double-click” on **Contract Authority**.

“Click” on the appropriate **User ID** or **User Name**: “Hank R. Chief” or “d90hchie”

“Click” on the bottom panel

“Click” on the **New** button on the toolbar.

“Click” on the appropriate **Group Description** for the user: District Construction Technician

Right –click on the **contract ID** window.

“Click” on Search

“Double-click” on the appropriate **Contract ID**: R90002

“Click” the **Close** button on the toolbar.

Removing Contract Authority from a User

Navigate from the **Main Panel**:

“Double-click” on **Contract Records (+)**.

“Double-click” on **Contract Authority**.

“Click” on the appropriate **User ID** or **User Name**: “Hank R. Chief” or “d90hchie”

“Click” on the appropriate **Contract ID**: R90001

“Click” on **Services** on the Menu bar.

“Click” on **End Contract Authority** in the Dropdown Menu.

“Enter” tomorrow’s date in the **Contract End Date** field

“Click” **OK**

“Click” the **Close** button on the toolbar.